Fitlife Brands, Inc.

FTLF

Nasdaq; healthcare; SIC 2833, Medicinal Chemicals & Botanical Products; CIK 0001374328

B

second fifth of 370 graded peers in healthcare

rank 132 of 370; percentile 35.5; sampling error 2.5 points; lower is stronger

A B C D E

B, the elk



Scoreboard

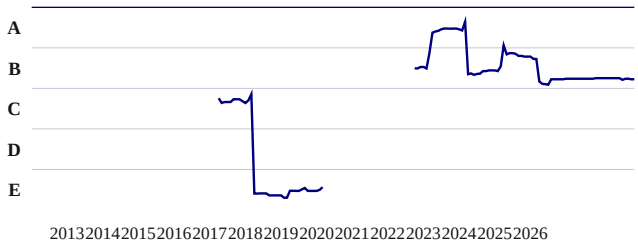
Profitability	C percentile 55.3
Solvency	C percentile 53.7
Growth and financing	A/B percentile 21.5
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $106.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, short runway, distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Apr 21, 2026 188 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$8.36 2026-10-22; market equity $78.5M; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, stronger toward the top; facts filed by each date only.

Business, in the company's words

opening of Item 1 of the 10-K received Mar 31, 2026

FitLife Brands, Inc. (the "Company") is a provider of innovative and proprietary nutritional supplements and wellness products for health-conscious consumers marketed under the following brand names: (i) NDS Nutrition, PMD Sports, SirenLabs, Core Active, Nutrology, and Metis Nutrition (together, the "NDS Products"); (ii) iSatori, BioGenetic Laboratories, and Energize (together, the "iSatori Products"); (iii) Dr. Tobias, All Natural Advice, and Maritime Naturals (together, the "MRC Products"); (iv) MusclePharm; and (v) Irwin Naturals, Applied Nutrition, and Nature's Secret (together, the "Irwin Products").

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 55.3						
Gross profitability	29.6%	32.3%		50.7	368	2025-12-31
Return on invested capital	not computable	9.3%				

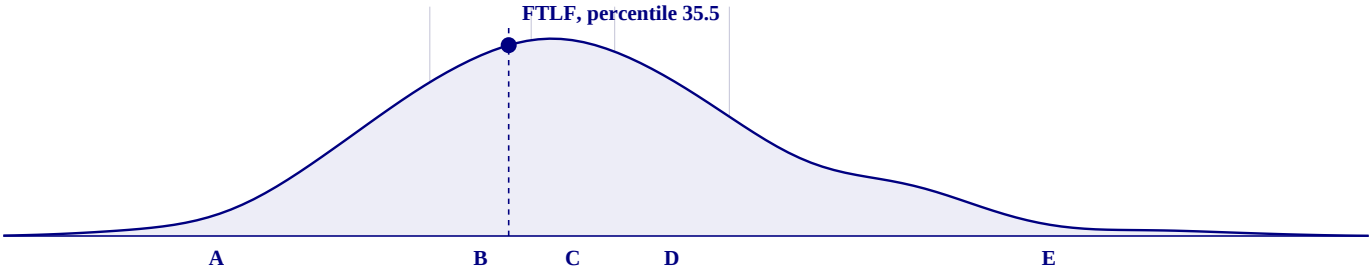
required facts have no common fiscal period end

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Accruals ratio	(1.4%)	(6.6%)		77.9	807	2025-12-31
Gross margin stability, five years	2.2 pts	2.8 pts		37.3	242	2025-12-31
Solvency, sleeve percentile 53.7						
Twelve-month failure probability	not computable	0.07%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	2.44	(0.33)		26.9	752	2025-12-31
Net debt to EBITDA	not computable	1.82x				
required facts have no common fiscal period end						
Interest coverage	not computable	(4.51x)				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	1.53x	2.94x		80.4	834	2025-12-31
Growth and financing, sleeve percentile 21.5						
Revenue growth, three-year compound	41.4%	10.1%		16.0	413	2025-12-31
Free cash flow growth, three-year compound	not computable	10.9%				
four consecutive annual FCF observations are required; found 9						
Reinvestment rate	54.9%	37.1%		42.7	104	2025-12-31
Asset growth, three years	60.5%	2.1%		5.9	700	2025-12-31
Net share issuance, one year	not computable	2.5%				
prior share count is 27 days earlier						

Among 370 peers

healthcare; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
127	Tandem Diabetes Care Inc. (TNDM)	34.1	B	
128	BrightSpring Health Services, Inc. (BTSG)	34.6	B	
129	BrightSpring Health Services, Inc. (BTSGU)	34.6	B	
130	Glaukos Corp. (GKOS)	35.0	B	fortress balance sheet
131	Insmed Inc. (INSM)	35.2	B	
132	Fitlife Brands, Inc. (FTLF)	35.5	B	
133	Establishment Labs Holdings Inc. (ESTA)	35.8	B	fortress balance sheet
134	Ionis Pharmaceuticals Inc. (IONS)	36.0	B	
135	Tenet Healthcare Corp. (THC)	36.3	B	
136	Biocryst Pharmaceuticals Inc. (BCRX)	36.6	B	fortress balance sheet
137	Nurix Therapeutics, Inc. (NRIX)	36.9	B	dilution

What the price implies

at the 2026-10-22 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(49.5%)	7.7%	14
Distance from 52-week high	(57.9%)	(31.4%)	21
EBIT to enterprise value	8.6%	(1.5%)	89
Free cash flow yield	9.4%	(1.0%)	91

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Book value to price	0.60	0.28	75
Sales to price	1.04	0.30	82
Composite equity issuance, five years	not computable	20.5%	
Relative strength against the sector, log excess return	(0.89)	(0.14)	14

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	74 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$103,825

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	$31.5M	2025-12-31	2026-03-31	10-K	26-010680
2	assets	us-gaap:Assets	$106.3M	2025-12-31	2026-03-31	10-K	26-010680
3	net income	us-gaap:NetIncomeLoss	$6.3M	2025-12-31	2026-03-31	10-K	26-010680
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$7.4M	2025-12-31	2026-03-31	10-K	26-010680
5	assets	us-gaap:Assets	$58.5M	2024-12-31	2026-03-31	10-K	26-010680
6	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$81.5M	2025-12-31	2026-03-31	10-K	26-010680
7	gross profit	us-gaap:GrossProfit	$28.1M	2024-12-31	2026-03-31	10-K	26-010680
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$64.5M	2024-12-31	2026-03-31	10-K	26-010680
9	gross profit	us-gaap:GrossProfit	$21.4M	2023-12-31	2025-03-27	10-K	25-009469
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$52.7M	2023-12-31	2025-03-27	10-K	25-009469
11	gross profit	us-gaap:GrossProfit	$12.0M	2022-12-31	2024-03-29	10-K	24-010119
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$28.8M	2022-12-31	2024-03-29	10-K	24-010119
13	gross profit	us-gaap:GrossProfit	$12.5M	2021-12-31	2023-03-24	10-K	23-007858
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$27.9M	2021-12-31	2023-03-24	10-K	23-007858
15	current assets	us-gaap:AssetsCurrent	$33.1M	2025-12-31	2026-03-31	10-K	26-010680
16	current liabilities	us-gaap:LiabilitiesCurrent	$21.6M	2025-12-31	2026-03-31	10-K	26-010680
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$11.9M	2025-12-31	2026-03-31	10-K	26-010680
18	operating income	us-gaap:OperatingIncomeLoss	$10.1M	2025-12-31	2026-03-31	10-K	26-010680
19	book equity	us-gaap:StockholdersEquity	$43.6M	2025-12-31	2026-03-31	10-K	26-010680
20	liabilities	us-gaap:Liabilities	$62.7M	2025-12-31	2026-03-31	10-K	26-010680
21	operating income	us-gaap:OperatingIncomeLoss	$7.5M	2023-12-31	2025-03-27	10-K	25-009469
22	interest expense	us-gaap:InterestExpense	$1.0M	2023-12-31	2024-03-29	10-K	24-010119
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42,000	2025-12-31	2026-03-31	10-K	26-010680
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$420,000	2025-12-31	2026-03-31	10-K	26-010680
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$8.2M	2025-12-31	2026-03-31	10-K	26-010680
26	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.9M	2025-12-31	2026-03-31	10-K	26-010680

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

27	current assets	us-gaap:AssetsCurrent	$18.1M	2024-12-31	2026-03-31	10-K	26-010680
28	current liabilities	us-gaap:LiabilitiesCurrent	$11.3M	2024-12-31	2026-03-31	10-K	26-010680
29	assets	us-gaap:Assets	$55.3M	2023-12-31	2025-03-27	10-K	25-009469
30	assets	us-gaap:Assets	$25.7M	2022-12-31	2024-03-29	10-K	24-010119
31	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,391,072	2026-04-23	2026-04-21	10-K/A	26-012937
32	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,391,072	2026-03-27	2026-03-31	10-K	26-010680

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.